



Investors in People  
Post Recognition Review Report  
For

# Kingston and Merton Education Business Partnership

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Investor in People Assessor  
On Behalf of Capital Quality

5<sup>th</sup> May 2009

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## ► INTRODUCTION

Kingston and Merton Education Business Partnership (KMEBP) is a small South London charity which supports schools in raising the achievement of young people in formal education. It achieves this through a range of projects working directly with young people, through for example mentoring, employers and teachers. It first achieved recognition for Investors in People in 2003 and this is its second review for the Standard.

The organisation is keen to explore some key themes as part of this review and the opportunity to approach this through the 'New Choices' framework was welcomed. The organisation is undertaking a major review of services and focus to –

“...better place us to realise our vision”

“to update our branding and better communicate our work” and

“to maintain and increase our funding to enable us to deliver and grow our services”

Following discussions at the planning meeting we agreed that the assessor would provide feedback on key themes which could contribute to this review particularly in terms of evidencing and benchmarking against recognised best practice. The assessor has mapped these requirements across the Single Framework and identified the relevant evidence requirements within indicators 1,3,5,7, and indicator 8 levels 2/3.

In addition to all the level one evidence requirements required to meet the IiP Standard the assessor will gather evidence and feedback at levels 2/3 as follows –

<b>Indicator</b>	<b>Level</b>	<b>Evidence Requirement</b>
Indicator 1	2/3	1,2,5,6,9,10
Indicator 3	2/3	1,11
Indicator 5	2/3	2,3,4,5,,9,13,14
Indicator 7	2/3	8,9
Indicator 8	2/3	6,12

Full details of all evidence requirements to be addressed within this review are attached at the end of this report.

Having carried out the assessment process in accordance with the guidelines provided for Assessors by Investors in People UK, The Assessor is totally satisfied that Kingston Merton Education Business Partnership meets the requirements of the Investors in People National Standard. The Assessor is delighted to congratulate the management and staff of KMEBP and look forward to working with the organisation in the future.

**Sherine Maas**  
**On behalf of Capital Quality Ltd**

## ► Executive Summary

### The Investors In People Standard



The Investors In People Standard is underpinned by three principles – plan, do and review. There are ten indicators as illustrated above. The assessment evidence is reviewed against these indicators and the evidence requirements to which they are linked. The report illustrate the outcomes of the assessment in terms of evidence met, areas for development i.e. where evidence requirements are met but further development in these areas can be achieved, and finally where evidence requirements are not met. Evidence for this review was collected through a mixture of interviews with staff, facilitators, mentors and Trustee and a review of a written portfolio of evidence provided by the organisation.

The assessment evidence for Kingston and Merton Education Business Partnership (KMEBP) were extremely positive and is this reflected in the very positive outcomes for each indicator. The leadership is passionate and the charity embodies many of the best aspects of a small to medium size organisations, flexibility, agility, responsiveness to the customer combined with the highest professional standards. The evidence demonstrates well established policies and processes; they were being consistently and effectively implemented and improved. People working within the

organisation believed “*this is a good organisation to work for*” – reflected in a low staff turnover, with many long serving loyal staff.

The CEO and managers have a professional and inclusive management style and are well respected by the staff. Managers and staff work cohesively, there is a good team spirit, they support each other and there are good systems of communication. The values of the organisation are at the heart of all its activity and the open and the honest relationship of colleagues is clearly valued by people at all levels. The assessment evidence demonstrated a keen commitment to the professional and personal development of all people. Congratulations go to everyone in the organisation as they have clearly all contributed to creating a culture where the highest professional standards can flourish.

The summary below highlights areas of particularly good practice and areas where further improvements can be achieved. Full details of assessment findings are reported in the main body of this report.

### Scoring Key

✓ indicates an evidence requirement is met with good evidence

**D** indicates an evidence requirement is met but with development areas

**X** indicates that the evidence requirement is not met which may be because it is not relevant or that significant inconsistencies exist

Evidence Requirement	PLAN				DO				REVIEW	
	1	2	3	4	5	6	7	8	9	10
1	✓	✓ <b>D</b>	✓	✓ <b>D</b>	✓	✓	✓	✓	✓	✓
2	✓	✓	✓	✓	✓	✓	✓	✓	✓ <b>D</b>	✓
3	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
4	✓	✓	✓		✓				✓	
5	✓		✓						✓	
6	✓									
<b>Level 2/3</b>										
1	✓ <b>D</b>		✓							
2	✓				✓					
3					✓					
4					✓					
5	✓				✓					
6	✓							✓		

7											
8							✓				
9	✓				✓		✓				
10	✓										
11			✓								
12								✓			
13					✓						
14					✓						
15											
Level											
4											
1											
2											
3											
4											
5											
6											
7											

► **Areas of particular strength or effective practice**

The following is a list of good practice characteristics or features found during the course of the site visits. These are recognised as exceeding the basic requirements of the Investors in People Standard: -

- The assessor found a strong shared sense of purpose and vision – “to support young people in achieving their potential involving businesses and wider community”
- People felt supported and encouraged to undertake continuous professional development (CPD).
- People were keen to emphasise the importance of this learning and the generous approach taken by colleagues in sharing knowledge and expertise.
- There is a thoughtful approach to work life balance issues and a range of initiatives which support staff
- There are clear expectations of leaders and managers in the organisation which are underpinned by the strong ethos and values
- There is a culture where people feel valued

- People highlighted the importance of partnership working and highlighted the valuable external input from colleagues in the local authority, schools and through other networks.
- The organisation and individual projects regularly review progress against objectives and annually through a range of evaluation processes.

▶ **Areas where development could be considered**

These represent areas found during the course of the site visits where the organisation might consider improving. Actions are not necessary to meet the Standard: -

- It maybe useful as part of the rebranding exercise currently being undertaken to agree the organisation values explicitly
- Capturing the performance improvements achieved both informal and formal learning could be improved within the learning and development planning process
- It maybe helpful to describe the knowledge skills and behaviours required for effective managers in a robust but simple framework.
- Some further fine tuning of plans to include evaluation/success criteria will provide clear benchmarks and add more rigour to the evaluation process

## ▶ Assessment Findings

### **Developing strategies to improve the performance of the organisation**

*An Investor in People develops effective strategies to improve the performance of the organisation*

#### **I. A strategy for improving the performance of the organisation is clearly defined and understood**

- Vision, Purpose & Strategy
- Clear core values with implications understood
- Involving people in planning

KMEBP has a clear vision and purpose which it articulates in its strategic goals and values. This is supported by a strategic plan with specific measurable objectives. The key strategic goals are -

- To support schools in raising the achievement of young people in formal education
- To support young people at risk of underachievement or social exclusion
- To provide support to enable young people to be equipped with the attitudes, skills and understanding required for adult and working life

Board, leaders and staff in the organisation described how these strategic priorities were developed through a combined “top down bottom up” process involving Board, stakeholders (including volunteers, mentors and facilitators), and staff through a cycle of planned meetings and consultation events. Plans are regularly reviewed at fortnightly team meetings and more in depth review and evaluation takes place during twice yearly away days. Strategic goals are underpinned by operational targets and actions covering all KMEBP projects. People interviewed at every level felt they were included at the appropriate level in this process and could contribute their ideas and views freely.

*“it’s a very committed staff group; we have grow as a team and all striving for the same goals”*

*“it’s a highly consultative organisation”*

The assessor found a strong shared sense of purpose and vision – *“to support young people in achieving their potential involving businesses and wider community”* and shared values and ethos. Common terms used to describe the values included -

- Collaborative – *“working together and with partners”*
- Committed – *“to improving the lives of the young people we support”*
- Integrity – *“being faithful or true to the vision”*
- Transparency – *“open and desire to share information, knowledge and expertise”*
- Trust – *“shared commitment and values engenders trust between colleagues”*

- Striving for quality – *“reflective practice – focus on how we can continually improve”*

*“they may not be written down – but we live our values in everything we do”*

There was a good understanding of how people’s roles contribute directly to achieving vision; the projects have clear and direct outcomes with young people.

It maybe useful as part of the rebranding exercise currently being undertaken to agree the values explicitly and importantly gain a common understanding of how these values would be translated in everyday activity.

## **2. Learning and development is planned to achieve the organisation’s objectives**

- Learning and Development planning linked to goals including resources and plan for evaluation
- People involved in identifying needs and know the purpose

Learning and development needs are assessed and planned inclusively by the leadership team, managers and staff using a range of processes. There are specific linkages to KMEBP’s strategic goals. They are focused around three themes –

- Meeting legal requirements, for example, to implement the requirements of every child matters,
- To meet organisational objectives – e.g. to support development of employer engagement
- To meet individual requirements – e.g. to develop understanding of the Charity sector.

Resources are allocated and detailed in the KMEBP budget.

The needs of the team, Trustees and Advisors and Mentors are addressed within the training plan. People confirmed that their needs were discussed regularly within appraisal, probationary reviews and informally as needs arise throughout the year. This could be initiated by the line managers or the individual and people felt supported and encouraged to undertake continuous professional development (CPD).

A significant amount of learning is through informal methods within team meetings, meetings with line managers, coaching and cascading. People were keen to emphasise the importance of this learning and the generous approach taken by colleagues in sharing knowledge and expertise.

Capturing the performance improvements achieved both informal and formal learning could be improved within the learning and development planning process. Include evaluation/success criteria in the learning and development plans and this will

provide clear benchmarks to assess the impact of the learning and development activity and add more rigour to the process.

### **3. Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people**

- Encouraging contribution of ideas
- Equal Access to support and learning
- Recruitment is fair, efficient and effective
- Work Life Balance is valued

There are many outstanding features to the working environment in KMEBP and the culture of mutual respect is one. This positive and open culture alongside policies and processes for communications such as the range of whole team and project meetings encourages people to contribute ideas and views to improve performance which they know will be welcomed.

All staff are included in the appraisal process and have regular feedback where development needs maybe identified. Informal discussions take place continuously as part of everyday supervision and management and this ensures any learning and development needs can be discussed and addressed as required.

There is a robust and well established recruitment and selection process which involves a range of selection methods including interviews, presentations and skills/knowledge observations as appropriate. People believe it is a fair process; there is an emphasis and investment made in the role description and person specification which is well thought through and therefore provides a firm basis for selection. Both staff and mentors interviewed confirmed that they believed the process was fair and projected a very professional image of the organisation to potential recruits.

One of the many strengths highlighted to me by staff in this organisation was its caring nature and the willingness of staff at every level to help each other professionally and personally, particularly in times of family crisis for example.

There is a thoughtful approach to work life balance issues and a range of initiatives which support staff. People were working a variety of working patterns and had the opportunity to work from home if appropriate. There was a strong sense that people knew what was expected of them and were trusted within a clear framework of performance review and support to manage their time efficiently.

- A culture which considers individual needs – *“not punished for being a parent – takes the stress away”*
- Well planned meetings schedule
- Clear expectations of managers to identify where people are struggling and use appropriate strategies *“people rally round if you need help – you are never left to struggle with anything on your own”*

- Good team working and flexibility with a willingness to share expertise and skills *“mutually supportive team – best I’ve ever worked in”*

#### **4. The capabilities managers need to lead, manage and develop people effectively, are clearly defined and understood**

- Clear leadership and management capabilities identified
- Development plans in place for managers to achieve desired capabilities
- People understand managers role

There are clear expectations of leaders and managers in the organisation which are underpinned by the strong ethos and values which are evident in all aspects of the working life. Managers have reference points such as job descriptions, accompanied by person specifications, and project and performance objectives. Development to meet expected standards is both in house through informal methods and external through recognised courses such as Charity Management Training. Managers confirmed they were clear on the expectations and staff described a consistent and supportive style of leadership which prevailed in KMEBP.

*“there is exceptionally good leadership here – organised, very efficient”*

*“they don’t just talk to talk here – they really mean it when they say their doors are open”*

It maybe helpful to describe the knowledge skills and behaviours required for effective managers in a robust but simple framework. These capabilities should be carefully aligned with professional standards for managers and leaders, for example from the Chartered Management Institute. These could form the basis for assessment against defined management standards and guidance on where further development or experience maybe required for career progression. They would also for a useful aid to recruitment and selection promotion and succession planning.

## **Taking action to improve the performance of the organisation**

*An Investor in People takes effective action to improve the performance of the organisation through its people*

### **5. Managers are effective in leading, managing and developing people**

- Top managers are role models of team work and sharing
- Management is in line with organisational values
- Confidence in managers
- Regular and constructive performance feedback
- Team work and sharing within/across teams

Staff in the organisation highlighted the clear and consistent style of leadership modelled from the very top. They describe an open, transparent collegiate approach with a clear emphasis on performance and achievement. Managers explained how they provided leadership and guidance to their teams through a range of processes including action planning, providing guidance on targets, observation and feedback. Just as important was the day to day informal support, being visible and available to colleagues and creating a positive and open environment.

Managers and staff described constructive feedback as a regular feature of their work experience in KMEBP. This is provided through team meetings and appraisal.

*“we have regular meetings, individually with the manager or teams and whole office – there are lots of opportunities for feedback”*

*“we meet regularly and get feedback in our reviews”*

*“as well as the informal feedback we have our annual appraisals”*

Volunteers also highlighted the feedback they received directly following any activity and collectively through various newsletters.

### **6. People’s contribution to the organisation is recognised and valued**

- Contribution is recognised and valued
- People believe they make and difference

Managers genuinely valued the contribution all staff, facilitators, and volunteers made towards achieving the Charity’s vision, and there was exceptionally positive feedback from all people interviewed on this issue. As well as direct feedback, formally and informally, strategies such as recognising expertise through giving presentations, recognising people strengths and giving them freedom to develop their ideas all contributed the culture where people feel valued.

Everyone was able to outline the contribution they make and how this should impact upon young people and in many cases also the wider community. It is very

clear that KMEBP's culture of recognising people's contribution leads people to feel that they have a major stake in the successes achieved. This was supported by many examples which confirm the efforts of managers (and colleagues) to recognise people's achievements and make them feel valued. These included

- Feedback during appraisals
- Praise and recognition during team meetings
- Highlighting achievements in meetings and newsletters
- Celebrating achievements at full staff away days
- Reinforcement of achievements in project evaluations
- Opportunities for additional responsibilities
- Informally – acknowledge and thanks intrinsic part of culture
- Individual messages and cards
- Social events

*“You feel valued every day”*

*“they are always telling you – individually, and at meetings – yes very much appreciated here”*

*“the ‘bad’ and ‘glad’ feedback we give at meetings gives us a good opportunity to recognise and value colleagues”*

*“there is a good staff team here – the ethos is very respectful and appreciative of everyone's efforts”*

*“the rewards are in the job – you get so much job satisfaction”*

## **7. People are encouraged to take ownership and responsibility by being involved in decision-making**

- Ownership and responsibility is encouraged
- People are committed to organisational success
- People feel trusted

The management have created a positive and open culture and environment where people feel very comfortable to approaching any colleague or manager with their views, ideas and opinions. There was a strong commitment to the ideals of the Charity and clearly people were committed to providing a professional service.

People identified a range of meetings, both across the whole organisation and within project groups – Curriculum, My Voice and Mentoring - as opportunities to put forward ideas, as well as informally on a one to one basis.

The senior staff actively encourage staff to innovate, take responsibilities and come forward with ideas and clearly there is a good climate of trust to encourage people. They should ensure that there is access to any latest research and ideas to stimulate and stretch people, and give them the background needed to develop their ideas.

Managers and staff did describe how people are involved and provided with relevant information to help them make decisions and also to innovate and develop. Information and knowledge was shared at team meetings, within project teams, during planning and networking sessions with mentors and facilitators. In addition people highlighted the importance of partnership working and highlighted the valuable external input from colleagues in the local authority, schools and through other networks.

*“they genuinely want our views”*

*“its very open – you can disagree – its completely safe”*

*“you have responsibility for every element of the project and therefore are expected to make all the day to day decisions”*

*“managers here are passionate about this work – they want your ideas – they put a lot of trust in us to keep on moving standards up ”*

*“there is a culture where people can say what they want to say – you will be listened to and taken seriously”*

## **8. People learn and develop effectively**

- Learning and development needs are met
- Induction and role change is effective
- Learning and development is an everyday activity

There were a range of methods in place to identify learning and development needs including – training needs analysis, project reviews, self evaluation, appraisal and regular meetings.

People described how their learning and development needs had been met through Local Authority workshops, workshops by the Mentoring and Befriending Association, with ‘Equal Voice’ too support facilitators, Conferences, informal coaching, mentoring and sharing of knowledge, skills and techniques with colleagues and managers. The topics covered areas such as Child Protection, Engaging with Families, training volunteers, Mentoring, Disability awareness, Charity Management, ECDL, first aid and health and safety. They were delivered by internal and external experts. All these areas had a clear link to achieving KMEBP and project priorities and applied directly to people roles. As well as development opportunities provided by the Borough there were opportunities provided through networks involving other EBPs and the community.

Staff, mentors and facilitators new to the organisation had a very planned and structured induction which had clearly detailed planned outcomes and covered both core areas such as health and safety, project requirements and was tailored to address individual development needs. In addition people highlighted the invaluable support of other colleagues, within their project teams and across the organisation.

The learning culture was very evident in the organisation and people spoke of the generous way colleagues and managers shared their knowledge. It was evident that

the CEO had prioritised the development of people as critical in achieving organisation objectives and this ethos is held throughout the Charity.

*“there is so much encouragement – but you never feel you are on your own”*

*“all my current skills for this role have been acquired from KMEBP”*

*“its very personalised – agreed with you”*

People confirmed that they were clear expectations for them to develop their learning and put it into practice and that their achievements were recognised and appreciated by colleagues.

*“whatever you learn you bring back to the session to put into practice – you are made to feel your input is important”*

## **Evaluating the impact on the performance of the organisation**

*An Investor in People can demonstrate the impact of its investment in people on the performance of the organisation*

### **9. Investment in people improves the performance of the organisation**

- Evaluation of impact of learning and development

The senior managers are fully conversant with the overall investment in terms of time, money and the resources required to meet learning and development needs. The organisation and individual projects regularly review progress against objectives and annually through a range of evaluation processes. There have been very tangible benefits of the investment in learning and development, for example the transfer of facilitators in house, contributing to the ability to develop programmes and events to support the Diploma. The less tangible but immensely valuable levels of staff commitment, is also clear evidence of the impact of the investment in a range of people management and development activities. Benefits include low absence and turnover rates for example, which are critical in an organisation of this size.

Managers do debrief after training, typically within meetings, and there is also a training impact evaluation form which people complete following any formal development activity; they described discussion of training courses at meetings, one to one's and through the appraisal process. As highlighted at indicator two, some further fine tuning of the learning and development plans to include evaluation/success criteria will provide clear benchmarks to assess the impact of the learning and development activity and add more rigour to the process.

People interviewed pointed to examples of how their career prospects had improved as a result of the support they had been provided in KMEBP including improved planning, networking and presentation skills, as well as product/project knowledge for example. Many described how their self confidence had improved by being encouraged to try, and succeed in doing things in new ways or doing new things entirely. They recognised these resulting from a mixture of good management, good team working and effective relevant training.

### **10. Improvements are continually made to the way people are managed and developed**

- Evaluation of people strategies leads to improvement

People at all levels could give examples of improvements resulting from the investment in people. These include –

- New team meeting structure
- Improved cross team communications

- More access to support by facilitators and mentors (via training days for example)
- More delegation and empowerment of to manage projects on day to day operational basis.

People interviewed did genuinely believe that management was committed to improvements at every level in the KMEBP including how they supported their staff. This report illustrates people interviewed do believe that KMEBP is a great place to work, and they were proud of work of the work carried out by the charity.

## ► Recommendation and Next Steps

Having carried out the assessment process in accordance with the guidelines provided for Assessors by Investors in People UK, The Assessor is totally satisfied that Kingston and Merton Education Business Partnership meets the requirements of the Investors in People National Standard.

Subject to the Recognition Panel endorsing the Assessor's recommendation, the Investors in People recognition is granted indefinitely, with a proviso that reviews take place no greater than 3 years apart. The organisation should discuss the timing of the first review with the Adviser.

**Sherine Maas**

**On behalf of Capital Quality Ltd**

**5<sup>th</sup> May 2009**

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## ► Options for your next Review

### **Investors in People Profile**

Investors in People Profile is an optional service for organisations where, instead of a conventional post recognition review or assessment, organisations can choose to be measured against the Standard and compare their performance with other Investor in People organisations. In addition to all of the usual benefits of Investor in People Recognition, a Profile Review will give clear guidelines for continuous development, provide an in depth look at your strengths and weaknesses and highlight areas of good practice. Profile is a premium product and the assessment requires a higher financial investment.

### **Internal Review**

Internal Review is a flexible review option available to all Investor in People organisations. It was introduced because recognised organisations identified that they wanted more involvement and ownership of their post recognition reviews. Internal Review works on selected principles of quality assured self-assessment and must be conducted with the full involvement of CQL. We develop your people to a nationally approved standard, providing you with an internal resource to enable you to monitor your own performance, target your resources appropriately and participate more fully in the review process.

### **Investors in People Interactive**

This free online support tool is designed to guide you through development activities and help you maintain the benefits of using Investors in People as an organisational development tool.

Obtain an on-going understanding of your organisation's current strengths and development areas by using the tool's diagnostic function which is built around 5 management practices which relate directly to the Investors in People indicators

You can also review and update your progress within the tool and access a wide range of downloads, good practice tips, templates and other resources to inspire and inform - no matter where you are on your Investors in People journey  
[www.investorsinpeople.co.uk/interactive](http://www.investorsinpeople.co.uk/interactive)

### **Promoting continuous improvement**

CQL offers an integrated advice and assessment support service, as well as workshops, surgeries and networking events to promote continuous improvement and maximize the benefits of working with the Standard. Details of the support available to you can be found on: -

Internet:  [www.cqlgroup.co.uk](http://www.cqlgroup.co.uk)

Telephone:  **0207 492 5920**

Email:  [info@cqlgroup.co.uk](mailto:info@cqlgroup.co.uk)

## Kingston and Merton Education Business Partnership – Evidence requirements

Indicator 1	Level	ER	Met	A strategy for improving the performance of the organisation is clearly defined and understood
Top Managers	1	1	▪	Top managers make sure the organisation has a clear purpose and vision supported by a strategy for improving its performance.
			▪	
Top Managers	1	2	▪	Top managers make sure the organisation has a business plan with measurable performance objectives.
			▪	
Top Managers	1	3	▪	Top managers make sure there are constructive relationships with representative groups (where they exist) and the groups are consulted when developing the organisations business plan.
			▪	
Managers	1	4	▪	Managers can describe how they involve people when developing the organisation's business plan and when agreeing team and individual objectives
			▪	
People	1	5	▪	People who are members of representative groups can confirm that top managers make sure there are constructive relationships with the groups and they are consulted when developing the organisation's business plan.
			▪	
People	1	6	▪	People can explain the objectives of their team and the organisation at a level that is appropriate to their role, and can describe how they are expected to contribute to developing and achieving them.
			▪	
Top Managers	2/3	1	▪	Top managers make sure the organisation has a clear set of core values that support its purpose and vision.
			▪	
Top Managers	2/3	2	▪	Top managers make sure the organisation's strategy is developed through the involvement of managers, people, stakeholders and other sources.

Managers	2/3	5	▪ Managers can describe the organisation's core values and what this means to the way they are expected to manage.
Managers	2/3	6	▪ Managers can describe how they are involved in developing the organisation's strategy
People	2/3	9	▪ People can describe the organisation's core values and what this means to the way they are expected to work.
People	2/3	10	▪ People can describe how they are involved in developing the organisation's strategy.

**Indicator 2**      *Level ER Met*      **Learning and development is planned to achieve the organisation's objectives**

Top Managers	1	1	▪ Top managers can explain the organisation's learning and development needs, the plans and resources in place to meet them, how these link to achieving specific objectives and how the impact will be evaluated.
Managers	1	2	▪ Managers can explain team learning and development needs, the activities planned to meet them, how these link to achieving specific team objectives and how the impact will be evaluated.
People	1	3	▪ People can describe how they are involved in identifying their learning and development needs and the activities planned to meet them.
People	1	4	▪ People can explain what their learning and development activities should achieve for them, their team and the organisation.

**Indicator 3**      *Level ER Met*      **Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people**

Top Managers	1	1	▪ Top managers can describe strategies they have put in place to create an environment where everyone is encouraged to contribute ideas to improve their own and other people's performance.
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Top Managers	1	2	<ul style="list-style-type: none"> <li>Top managers recognise the different needs of people and can describe strategies they have put in place to make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance.</li> </ul>
Managers	1	3	<ul style="list-style-type: none"> <li>Managers recognise the different needs of people and can describe how they make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance.</li> </ul>
People	1	4	<ul style="list-style-type: none"> <li>People believe managers are genuinely committed to making sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for them to learn and develop which will improve their performance.</li> </ul>
People	1	5	<ul style="list-style-type: none"> <li>People can give examples of how they have been encouraged to contribute ideas to improve their own and other people's performance.</li> </ul>
Top Managers	2/3	1	<ul style="list-style-type: none"> <li>Top managers can describe strategies they have in place to make sure recruitment and selection meets the needs of the organisation and is fair, efficient and effective.</li> </ul>
People	2/3	11	<ul style="list-style-type: none"> <li>People believe recruitment and selection is fair.</li> </ul>

**Indicator 4**      *Level ER Met*      **The capabilities managers need to lead, manager and develop effectively are clearly defined and understood**

Top Managers	1	1	<ul style="list-style-type: none"> <li>Top managers can describe the knowledge, skills and behaviours managers need to lead, manage and develop people effectively, and the plans they have in place to make sure managers have these capabilities.</li> </ul>
Managers	1	2	<ul style="list-style-type: none"> <li>Managers can describe the knowledge, skills and behaviours they need to lead, manage and develop people effectively.</li> </ul>

People 1 3 ▪ People can describe what their manager should be doing to lead, manage and develop them effectively.

**Indicator 5** *Level ER Met* **Managers are effective in leading, managing and developing people**

Managers 1 1 ▪ Managers can explain how they are effective in leading, managing and developing people.  
▪

Managers 1 2 ▪ Managers can give examples of how they give people constructive feedback on their performance regularly and when appropriate.  
▪

People 1 3 ▪ People can explain how their managers are effective in leading, managing and developing them.  
▪

People 1 4 ▪ People can give examples of how they receive constructive feedback on their performance regularly and when appropriate.  
▪

Top Managers 2/3 1 ▪ Top managers can describe how they act as role models when demonstrating the leadership and management capabilities in line with the organisation's values.  
▪

Top Managers 2/3 2 ▪ Top managers can describe how they act as role models when working as a team and sharing knowledge.  
▪

Managers 2/3 3 ▪ Managers can describe how they lead, manage and develop people in line with the organisation's values.

Managers 2/3 4 ▪ Managers can describe how they encourage people to work together and share knowledge within and across teams.  
▪

Managers 2/3 5 ▪ Managers can describe how they make sure people receive information, advice and guidance to help them plan and develop their career.

People	2/3	8	▪ People can describe how their manager leads, manages and develops them in line with the organisation's values. ▪
People	2/3	9	▪ People can describe how they work together and share knowledge within and across teams.
People	2/3	13	▪ People can confirm that they respect and trust their managers. ▪
People	2/3	14	▪ People can confirm that they have confidence in the leadership and management capabilities of top managers.

**Indicator 6**      *Level* *ER* *Met*      **People's contribution to the organisation is recognised and valued**

Managers	1	1	▪ Managers can give examples of how they recognise and value people's individual contribution to the organisation. ▪
People	1	2	▪ People can describe how they contribute to the organisation and believe they make a positive difference to its performance. ▪
People	1	3	▪ People can describe how their contribution to the organisation is recognised and valued.

**Indicator 7**      *Level* *ER* *Met*      **People are encouraged to take ownership and responsibility by being involved in decision-making**

Managers	1	1	▪ Managers can describe how they promote a sense of ownership and responsibility by encouraging people to be involved in decision-making, both individually and through representative groups, where they exist. ▪
People	1	2	▪ People can describe how they are encouraged to be involved in decision-making that affects the performance of individuals, teams and the organisation, at a level that is appropriate to their role. ▪
People	1	3	▪ People can describe how they are encouraged to take ownership and responsibility for decisions that affect the performance of individuals, teams and the organisation, at a level that is appropriate to their role.

People 2/3 8 ▪ People believe their managers trust them to make decisions that improve performance.  
▪

People 2/3 9 ▪ People can confirm that they are committed to the success of the organisation.

**Indicator 8**      *Level ER Met*      **People learn and develop effectively**

Managers 1 1 ▪ Managers can describe how they make sure people's learning and development needs are met.  
▪

People 1 2 ▪ People can describe how their learning and development needs have been met, what they have learnt and how they have applied this in their role.  
▪

People 1 3 ▪ People who are new to the organisation, and those new to a role, can describe how their induction has helped them to perform effectively.

Managers 2/3 6 ▪ Managers can describe how they make sure learning and development is an everyday activity.

People 2/3 12 ▪ People can confirm that learning and development is an everyday activity.

**Indicator 9**      *Level ER Met*      **Investment in people improves the performance of the organisation**

Top Managers 1 1 ▪ Top managers can describe the organisation's overall investment of time, money and resources in learning and development.  
▪

Top Managers 1 2 ▪ Top managers can explain, and quantify where appropriate, how learning and development has improved the performance of the organisation.  
▪

Top Managers	1	3	<ul style="list-style-type: none"> <li>▪ Top managers can describe how the evaluation of their investment in people is used to develop their strategy for improving the performance of the organisation.</li> <li>▪</li> </ul>
Managers	1	4	<ul style="list-style-type: none"> <li>▪ Managers can give examples of how learning and development has improved the performance of their team and the organisation.</li> <li>▪</li> </ul>
People	1	5	<ul style="list-style-type: none"> <li>▪ People can give examples of how learning and development has improved their performance, the performance of their team and that of the organisation.</li> </ul>

**Indicator 10**      *Level ER Met*      **Improvements are continually made to the way people are managed and developed**

Top Managers	1	1	<ul style="list-style-type: none"> <li>▪ Top managers can give examples of how the evaluation of their investment in people has resulted in improvements in the organisation's strategy for managing and developing people.</li> <li>▪</li> </ul>
Managers	1	2	<ul style="list-style-type: none"> <li>▪ Managers can give examples of improvements they have made to the way they manage and develop people.</li> <li>▪</li> </ul>
People	1	3	<ul style="list-style-type: none"> <li>▪ People can give examples of improvements that have been made to the way the organisation manages and develops its people.</li> </ul>